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# THE CONFIDENTIAL EXCHANGE

## A FORM OF SOCIAL CO-OPERATION

BY

**MARGARET F. BYINGTON**ASSOCIATE DIRECTOR OF THE CHARITY ORGANIZATION DEPARTMENT  
OF THE RUSSELL SAGE FOUNDATION

AUTHOR OF

"Homestead, the Households of a Mill Town" and "What Social  
Workers Should Know about their Own Communities"

CHARITY ORGANIZATION DEPARTMENT OF THE  
RUSSELL SAGE FOUNDATION  
ROOM 613, 105 EAST TWENTY-SECOND STREET  
NEW YORK CITY  
1912

*Jessica B. Peixotto*

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*Frances B. Prayson*

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# THE CONFIDENTIAL EXCHANGE

## A FORM OF SOCIAL CO-OPERATION

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The Confidential Exchange is a card index; but, far from being a mere device, it grows out of and is dependent upon a living spirit not often associated with indexes. "Withersoever the spirit went, thither as the spirit went the wheels also were lifted up withal, and followed it: for the spirit of life was in the wheels.\* Skilfully manipulated by a group of people believing profoundly in the principle of social co-operation, it can win gradually the working together of a large group of social agencies. Through its aid no one of these agencies need take a step in any direction to benefit a human being without being assured of the advice and experience of all the others that have ever known the same person or any of his kindred. Like all other living things it is going to develop in directions that this pamphlet cannot indicate, and is going to serve great ends that are now only very dimly apprehended. But one way to promote future growth is to analyze and record present experience. Preparatory to writing this brief account of the methods of some of the Exchanges now in operation in the United States, I visited five of them in 1911. The results of these visits are given in the following pages, first in a description of the successive changes made in the oldest Exchange—the one in Boston; then in an enumeration of the reasons for the great interest now shown in Exchanges; and last in a somewhat detailed account of their practical administration and office details. It has not been possible, probably, to answer all the questions that are in the minds of those who are at present thinking of starting new Exchanges, but personal correspondence on the subject, addressed to the Charity Organization Department, will receive careful attention.

### I. HISTORY OF THE OLDEST EXCHANGE

The Exchange that is the oldest in point of time, though one of the youngest in spirit, is that conducted by the Boston Associated Charities, and the story of its development throws an interesting light on the present status of the movement for Exchanges.

Thirty-five years ago even Boston had few of the modern types of philanthropic agency now so generally established. There were

\*Ezekiel 1, 20.

no children's aid societies, no charity organization society, no medical social service, no settlements. A few large relief agencies existed, including the city outdoor relief department, and, in addition, there were sewing circles and other small groups giving relief with informal and kindly service to the poor. With the increase in their number and with the beginning of the foreign immigration, these agencies found it more and more difficult to know the people they helped and to know each what the others were doing. So, in 1876, a group of volunteer workers decided to start a Registration Bureau in which they could enter the names of all the families being aided by charity and the amount of relief that they were receiving. Delegates from the various agencies came together to discuss the plan and, after expressing their approval, elected a committee to carry on the work. A small amount of money was raised and one of the volunteers interested undertook to do the work for a nominal salary. A good start was made; the co-operation of several of the largest societies and of the Overseers of the Poor was secured. But, after a year and a half, the volunteer was obliged to give up the work, and the plan was abandoned.

When in 1879 the Associated Charities was organized, it took up this work again as a normal part of its task of organizing the charitable forces of the community. More formal methods were then adopted and a registrar employed. Instead of recording only the amount of relief given, as had been done at the start, societies were urged to send in the history of the families and what had been done for them. "This change of policy has done much to gain the confidence of the public."\* Some of the societies loaned their records, which were copied in full in the Registration Bureau, others sent in lists on blank forms furnished by the office. In the first year, July 1, 1879, to June 30, 1880, 7716 families were registered by 345 individuals and 44 societies, including most of the important ones in the city.

At first, the emphasis was largely on preventing duplication of relief, and only secondarily on combining knowledge of individual families. In the first annual report of the Associated Charities in 1880 the objects were given as follows:

Registration aims to accomplish Four Great Aims by gathering up a Full True Record of Every Family Receiving Relief.

1. To aid every private person to give alms only to worthy poor, or rather to give *with knowledge*.
2. To lessen the labors of relieving agencies, by giving to each the knowledge of the others.
3. To stop imposture so that the occupation of living on alms may cease. Registration notifies every lazy tramp to quit Boston or go to work.
4. The main object is to make sure that relief is adapted to the real needs. This will lessen relief for the unworthy. But for the really worthy and most suffering poor *it should make relief more full and prompt and tender*.

Or again, its object is "to secure an interchange of information, and thereby detect imposture, discourage begging, distinguish the worthy from the unworthy, and promote economy and efficiency in the distribution of relief."

\* First Annual Report of the Boston Associated Charities, 1880, p. 55.

From that period until within the last few years, the general plan was the same, the growth of the Bureau being slow but sure. The Associated Charities all this time was steadily developing its program of family rehabilitation, in which relief plays an important but a subordinate part, but still for a good many years its Registration Bureau continued to be used almost exclusively by relief-giving societies. More agencies were being organized in the community whose service to the poor did not include the giving of relief, and which claimed that there was consequently no reason why they should register their work. But one large group, the children's agencies, soon recognized that some form of exchange was needed. Families often drifted from one children's society to another or even asked the services of two at the same time, and it became increasingly evident that their work with a given family would be unintelligent and superficial if they did not know whether others had dealt or were dealing with it. They had felt, however, that registering the facts about the children under their care was a violation of the strict confidence with which we all feel that such life stories should be guarded. The Registration Bureau also realized that the copies of their records were not always up to date and did not give as full a picture of the family or individual situation as was in the mind of the visitor, so that in any important case it was necessary to go directly to the society which knew the people. The Bureau therefore offered to accept from the children's agencies only "identifying information" and to refer directly to them anyone who inquired about one of their applicants.

This plan has been extended to the other organizations. The Confidential Exchange, as it is now called, is no longer an office where you record your knowledge of a person or a family for the benefit of some one else; it is rather a source through which you may secure information that will be of definite value to you in your own service to that particular client. Societies now do not "register their cases with the Associated Charities," but "inquire of the Confidential Exchange." When an agency telephones or otherwise refers the names of all the new families applying to it that day, these are recorded in the office as so many "inquiries" even though the family may not previously have been registered in the Exchange. Sometimes there is a good deal in a name, especially as in this case, where a change of name expresses a definite change in policy. The Registration Bureau of other days is now a Confidential Exchange of information among the societies of Boston, for which the Associated Charities acts as agent. The history of its growth marks the direction of social service development in the last thirty years.

**THE BOSTON OFFICE SYSTEM.**—The general office system developed in Boston has been so closely followed that it may be briefly outlined here, leaving for a later section more detailed discussion of office methods.

The mechanism of the Exchange is an alphabetical index with a card for each family or unattached person known to any of the inquiring agencies. This card gives the "identifying information,"

the names, ages and occupations of the members of the family group, names and addresses of relatives, and the names of agencies interested, with the date on which each inquired. No facts about family history or treatment are included. When a co-operating society becomes interested in a new family, or in any one of its members, it inquires at once whether the Confidential Exchange knows the family or person. This inquiry is made either by telephone or by mail on printed slips furnished by the Exchange. The Exchange looks up the family in the index, and then reports to the inquiring agency the names of any societies that have been previously interested and the dates on which they inquired. If the information given by the inquirer is not sufficient to make identification possible, the agency is so notified, with the request that it inform the Exchange when further facts are secured. The Children's Aid Society, for example, inquires about Mrs. Mary Jones, and is informed that the North End Mission "inquired" in January, 1910, the S. P. C. C. in December, 1910, and the Social Service Department of the Massachusetts General Hospital in March, 1911. The Children's Aid Society then calls up, or, better still, personally interviews, all these agencies, and secures directly from them what data they have about Mrs. Jones and the story of their relations with her. Experience has indicated that it is wiser to have *no information* in regard to the family pass through the office of the Exchange; that it should give only the names of interested societies.

While its mechanism is simple, the success of the Boston Exchange has depended in a measure on an admirable arrangement of cards and a filing system which have made accurate and rapid identification possible.

With a sound system as basis, it has kept mere details elastic and adapted them to the methods of the societies interested. From the Overseers of the Poor, the Exchange borrows current records and makes its own index cards; to one private relief society, it sends a clerk to do the necessary transcribing; from most of the child-caring and medical agencies it accepts inquiries by telephone, and by slip from a vocational counsellor; from some private relief funds it receives a monthly list; from a school for crippled children and certain church sewing societies, an annual one, etc. Some agencies use both methods, telephoning about cases in which action is urgent, and sending in lists for the others.

The Exchange must recognize that in order to make itself of use to the other agencies it must be earnest but adaptable; must be ready to consider the needs of others rather than its own convenience. No system of cards can make it succeed unless behind it is a genuine belief that the Exchange is performing a service of real value to the families and individuals recorded. The recognition of the value of this faith is perhaps most clearly shown by a recent incident. The council of one of the settlements, on which serve members of the neighborhood clubs, had declined to allow their nurse to inquire at the Confidential Exchange. At the suggestion of one of the residents,

three members of the mothers' club of the settlement visited the Exchange. They were shown the card, and were told how it would help the nurse, especially by informing her whether other medical agencies had previously treated the family. They asked some questions which gave an opportunity to explain its confidential character, and went home satisfied to recommend that the council allow the nurse to use the Exchange. The democratic spirit which animates the work made it not only possible but the natural thing to explain the Exchange without offense to one whose name might possibly be registered there.

## II. THE PRESENT INTEREST IN EXCHANGES

As we contrast the present situation in social work with 1879, when the first Registration Bureau was started, we see a marked increase in the number of agencies dealing with the family either directly or through some one member whose problem is nevertheless bound up with that of the whole family group. Children's agencies are now realizing the desirability of keeping children in their own homes whenever this is possible, social service departments of hospitals are seeking to remove social handicaps to physical recovery—these are but two instances of the general recognition of the relation of home conditions to the welfare of individuals. This interest in home life means that many more people are visiting homes, and that the investigation of home conditions is becoming more and more extensive. It therefore follows that the Confidential Exchange is going to become more and more necessary; that the experience of any given agency with a family is going to be utilized by an increasing number of others. The constant interchange of information, moreover, leads to a better understanding of one another's points of view.

**I. MORE INTELLIGENT WORK WITH FAMILIES.**—As our standards of investigation are raised, we must see to it that a family shall not have to answer the necessary questions more than once. In justifying a careful and full investigation, the charity organization society has always claimed that a family need never be so investigated more than once, since records keep the most important facts of family history permanently. But when a number of agencies in one city have quite as high a standard of investigation as the charity organization society, or a better one, we can never be assured, unless we have a Confidential Exchange, that the family may not have to tell its story repeatedly.

This is not only true of past history. Each agency now dealing with a family sees the present situation from a different angle and makes its own contribution toward the complete picture which is often needed. The success of future treatment depends, however, upon joint plans, in which each agency has a definite part assigned to it. The Confidential Exchange is the center through which such co-ordination is most easily effected. The following cases

illustrate these three ways in which the Exchange has definitely aided in making work with families more intelligent.

A white girl with a colored illegitimate child, applying to a charity organization society, claimed to be married and gave full information about her home and relatives in Nova Scotia. Through the Confidential Exchange, the society learned that the S. P. C. C., which had been previously interested in the girl, and to which she had told the same story, had written to Nova Scotia but could learn nothing about her. At a previous address the landlady had told the S. P. C. C. that the girl had an aunt in one of the suburbs, but they, having already lost track of her, had not followed up this vague clue. The charity organization society was thus saved the delay incident to following up the Nova Scotia clues, and also secured from the S. P. C. C. the previous address which the girl had let fall in her *first* statement but not in her *second*. The worker in the charity organization society decided to seek out the mythical aunt, whom she found to be a person of considerable intelligence and willing to take the girl under her personal supervision. It was a difficult case; so cautious were the girl and the landlady that the essential clues could hardly have been secured a second time.

In another city a Confidential Exchange is just being started, and the infant mortality nurses and the tuberculosis nurses have not yet learned to use it. One family was badly infected with tuberculosis, the father dying, and the mother in an advanced stage of the disease. There were seven children, the youngest a nursing baby. The tuberculosis nurse kept urging the mother to stop nursing the child, but she refused to do so. Finally the tuberculosis nurse found that the infant mortality nurse had been visiting the family and, not knowing that the mother had tuberculosis, was insisting that she nurse the child. When the two nurses got together on the case, it was too late, for the baby died of tubercular meningitis.

A Jewish family about whom a settlement inquired of the Exchange was a month later referred by a charitable gentleman to the Associated Charities. The latter learned from the settlement that the woman, who was a widow and had formerly been most independent in spirit, was getting demoralized, owing to the number of people who were beginning to help her. The gentleman was therefore referred by the Associated Charities to the headworker, who persuaded him not to give the woman \$200, as he wished, but to give the headworker \$30, with which she provided milk for the children. Within two weeks two others, a society and an individual, inquired and were referred to the settlement. Through the Exchange the headworker was enabled to persuade the woman to follow her advice.

The Confidential Exchange is of special help sometimes to an agency which has no trained social worker to visit its families, but which needs some knowledge of home conditions. The physician in charge of a milk fund says that the Exchange saves them money and makes their work more efficient, since they can learn through it before they visit a family whether any charity knows them and thinks they should have free milk, and if so whether it would provide the milk. Their nurse, who is not trained in making social diagnoses, would find it more difficult to make the decision. Similar help was given a bureau for the handicapped, which was appealed to for work by a woman who said that her husband was employed but that, through his illness, they had run into debt, so she wished to earn something. The Associated Charities, which was found to have known the family for some time, believed that the man shirked his responsibilities, and that the woman should not work but should, by

careful housekeeping, keep expenses as low as possible. This decision the bureau was glad to accept.

2. HELP IN MEDICAL DIAGNOSIS.—Especially are physicians coming to realize the value of social evidence in the diagnosis and treatment of disease. The following story shows how the accumulated experiences of several non-medical societies in dealing with a case finally pointed the way to a mental diagnosis:

A Mrs. W. applied to the Associated Charities, saying that she had been married a year before, and that, as her husband was now ill and she was soon to be confined, she needed help. Through the Confidential Exchange the visitor learned that a reform school for girls had inquired about her some years earlier. The school stated that the girl was below par mentally, had been unruly and untruthful, and had already had one illegitimate child. Every effort was made by the Associated Charities to keep the girl straight, but without success. During the next two years six agencies inquired of the Exchange with regard to her, the last a hospital to which she was applying for care during confinement. It had intended to admit her, but, on hearing her record, decided to send her to the almshouse infirmary, with the request that she be placed under observation for commitment to an institution for the feeble-minded. Each agency that had known her contributed some facts that helped to reveal her mental condition. She is now under careful medical supervision.

3. FINANCIAL SAVING.—Lastly, we may refer to an important argument for the Exchange—to its saving of time for each society using it. A children's society in a large city estimated that by eliminating unnecessary investigations the Exchange had saved them the equivalent of one worker's time—no mean item in a crowded budget. In addition, the knowledge secured from other agencies had reduced the time and money expended in trying out wrong plans for bettering family situations.

### III. ADMINISTRATION

We may grant, then, that more and more are agencies in each community feeling the need and value of the Exchange. In visiting five different cities, I found a general feeling that it is a "community activity," and that every agency dealing with family problems should consider its use an integral part of its work. Who then should manage the Exchange—the charity organization society, some other agency, or the societies jointly? The Confidential Exchange is more likely to succeed if directly controlled by one agency, and that the one having the deepest enthusiasm for intensive work with families. Since in most communities this is or should be the charity organization society, it is, as a rule, the one that should conduct the Exchange. If there is no charity organization society, or if it is not doing good case work, then some other agency may have to assume the task, as does the S. P. C. C. in some Massachusetts towns. The Exchange cannot, however, perform its maximum service in making more intelligent and useful our work with and for human beings unless the person who is in charge knows what good case work is, and believes that the Exchange can be so conducted as to improve it. The Exchange may of course be run, as in Philadelphia, by a committee

representing the agencies dealing with needy families and dependent children. While this form of organization has a certain obvious advantage, in emphasizing the co-operative nature of the work, it makes supervision and financial support more difficult. The boards of the various societies are not easily persuaded to appropriate, from their own funds, enough money to maintain the work adequately, and its appeal will not be popular enough to make raising money by appeal easy. Neither is a delegate supervisory committee likely to push the work with the same enthusiasm and the same interest in details as would an agency which has a primary interest in it and is directly responsible for its success. If one agency finances and manages the Confidential Exchange, it may have an advisory committee of delegates from other agencies—a plan that has been well worked out both in Cleveland and in Baltimore.

1. MANAGEMENT.—In Cleveland, at the request of a number of interested agencies, the secretary of the Associated Charities appointed a Committee on Co-operation, consisting of nine members and including a paid or volunteer worker from each group of social agencies in the city—medical, children's, city charities, etc. This committee, after careful deliberation, decided that it was best to have the Associated Charities conduct the Exchange as a department of their work. The Exchange is therefore in the Associated Charities office, and the expense of running it is met by them. The Committee on Co-operation, however, still maintains supervision over it, and considers from time to time how to increase its usefulness. To avoid any possible conflict, this committee also agreed to serve as the Committee on Registration Bureau of the Associated Charities.

In Baltimore the Exchange was started and is maintained by the Federated Charities. After it had been running for two years, the agencies using it were asked to send delegates to a Council which should discuss the working of the Exchange and act as advisory committee to it. This Council, though it has been in existence only a short time and is still in the experimental stage, has proved its worth in clearing away misconceptions about methods and objects, in developing co-operation, and in evolving ways of increasing the Exchange's usefulness to individual agencies. For example, the school nurses employed by the city keep no records and are not given an appropriation that makes it possible for them to do so. On meeting with other nurses and visitors in the Council, they began to realize that their knowledge of the children would be valuable to other workers. So now they write on the back of the inquiry slip the important facts about the child they are treating. These the Confidential Exchange copies on its index card (contrary to its usual custom), and thus makes the facts available for others interested. It is hoped, of course, that later the city will provide for keeping full records.

A spirit of unity seems to have been fostered already by the Council. Through it a number of conferences have been arranged

about the individual families in which several agencies happen to be interested—a valuable method of solving difficult case problems. One of these cases may be of interest:

A woman left her husband and with her child went to live with another man, by whom she had a second child. When the Federated Charities became interested in her, they insisted that she leave the man and, that the association might be broken, moved her to a new neighborhood. But the man followed her, and the Federated Charities then felt that, as she was not a very good mother, her home should be broken up. A worker from another society, who visited her, felt less strongly the evil of this situation, and was willing to let the two live together, since he thought that the woman was morally too weak to know right from wrong, and that the man was helping to support her. It was found that several other agencies were working with the family and a conference was called at the business office of one of the individuals interested in them. In this conference it was decided to give the woman one more trial, but it was agreed that, if she ever took the man back, they would all unite to place the children in a better home.

*What  
case work*

A joint committee is not, of course, an essential part of a Confidential Exchange; the Boston Exchange has increased its usefulness and the enthusiasm of the co-operating agencies without one. In many communities, however, a committee would undoubtedly be helpful both in securing co-operation and in providing a means of developing social activities in common.

**2. GETTING STARTED.**—Granting, then, that some one society is to carry on the Exchange, the start should be made only after preliminary consultation with those agencies whose co-operation is essential to the success of the plan. A Confidential Exchange which has not the support of other agencies than the one starting it is obviously valueless. Probably not more than a few will be enthusiastic in the beginning, but that nucleus there must be.

To gain such backing, a fairly long period of discussion is sometimes necessary. Talk about its general value, call to the attention of other agencies special instances showing the need of it, keep it in your mind and theirs until the feeling has ripened. Probably the smaller the city the more such education will be needed, for the less obvious is the need and the stronger the prejudice to be overcome.

When this small group, including perhaps the associated charities, the children's aid society, the largest relief society, and possibly the city charities, have expressed their interest and willingness to co-operate, a meeting should be called of delegates from all the social agencies of the city to whom the plan is to be proposed and whose co-operation is to be asked. As a preliminary, literature descriptive of the Exchange may be sent to the paid workers and board members of charitable agencies. At this meeting the constructive side of the work, the saving to the agencies of time and money, and above all, the genuine service to their clients, the poor, should be emphasized. Sample forms should be shown to indicate how little work is involved for the inquiring societies, and to convince them that they are not being asked to give confidential information about

their families. It may seem wise to call this meeting before cards are printed or final plans for the Exchange made, so that those present may suggest ways in which the work could best be adapted to their office methods.

There need be no discouragement if such a meeting is small; the Confidential Exchange, until it is really at work, is too new a plan to appeal to many people. How can a card index help them? They are quite capable of dealing with their own cases, and besides it is too much trouble. Such objections, which are likely to be expressed by many, can be overcome only as the Exchange demonstrates its real value.

3. GROWTH.—In Cleveland, the members of the Committee on Co-operation have assumed responsibility for the agencies in their respective groups, going to them personally and urging them to use the Exchange. These representatives of the various societies make excellent missionaries, because the Exchange is of greater value to each society in proportion as all the agencies in its own group inquire. Moreover, arguments that come thus from outside the Confidential Exchange itself have more force, and emphasize the co-operative character of the undertaking. The members of the committee in Cleveland also plan to remind their fellow workers who have agreed to inquire but fail to do so regularly.

If certain types of agency—for instance, the medical charities or the churches—are not convinced that they need to inquire, call an informal conference of representatives from each agency in the group. Get either a worker in one of them who believes in the Exchange, or some one from your own board whose word would have influence—a doctor, for example, or a clergyman—to explain its especial value to them. In Boston, at the request of one of the medical agencies, a special leaflet was prepared for physicians and others interested in medical charities.

A totally different way of inducing agencies to use the Exchange is to secure the backing of your Charities Endorsement Committee. The Cleveland Chamber of Commerce has made one inflexible rule in granting endorsement; that the agency, if it deals with individuals or families, shall register with the Charities Clearing House. This step can hardly be taken, however, until the Exchange is well organized and has secured general recognition in the community.

4. INTERESTING NEW AGENCIES.—Another way to extend the use of the Exchange is for those who do use it to point out to those who do not the failures in treatment, disastrous to both alike, that may be traced to failure to inquire. The attention of one Jewish agency was called to a family for whom sixteen societies, twelve of them non-Jewish, were working. This was the final argument that induced it to use the Exchange. Or if a society is sure that its families are never known to other agencies, ask it to let you look up some of them, promising to make no record but simply to find out how many can be identified. This plan has been tried successfully with church sewing societies, private relief funds, etc., two-thirds of whose bene-

ficiaries sometimes have been found in the Exchange as known to one or more agencies. So large a proportion of the agencies in Boston now use the Exchange that they all say, "We can't afford not to." The length of time that has been needed to bring that Exchange to its present position should teach patience to those who find the process of starting difficult. Exchanges will develop more rapidly now, however, in these days of longer social vision.

As a matter of fact, the best argument for the Exchange is to use it. When people hesitate to inquire, ask them to experiment and see if it is not worth while. A dispensary physician who was asked to try it for just one month said at the end of that time that it had made him realize the value of social facts in dealing with medical cases; that it made him think more of his patients. Again, urge them to inquire about doubtful cases at least, and they will tend to turn more and more often to the Exchange after this trial. One church worker said, "I used to inquire whenever I thought there was a reason for inquiring. Now I inquire unless I have some special reason for *not* doing so."

This last point is one to remember. It pays, when people hesitate about using the Exchange, to assure them that, if there is some special case about which they are unwilling to inquire, they need not do so. The longer they use the Exchange, the less likely they are to make these exceptions, but it relieves their minds at the start to know that they need not include "exceptional cases."

5. ANSWERING OBJECTIONS.—Two objections will probably have to be overcome in any city: "There is no need for us to inquire; we do not give relief; it would not help us in our work with the family." "Our relation with the people who come to us is confidential and we cannot record their names elsewhere."

To answer the first objection, we must disabuse their minds of the idea that the object of the Exchange is to prevent overlapping of relief; and must show instead that its aim is to pool all our hard thinking about the welfare of a given family, in order that we may do for them the wisest possible thing. This need was well expressed by a worker in a rescue home for girls, the type of agency that most often feels that it cannot use the Exchange because of the special character of its work. She said: "I owe it to every girl who comes to me to give her the most intelligent treatment that I can. Here, in the Confidential Exchange, is a possible source of valuable information, and I am not justified for the girl's sake in neglecting to make use of it. In one case, a girl's mother was urging her to give up her baby, conceal the fact of its existence, and come home to live. From a society that had been interested in the family some years before, I learned that the mother herself had had an illegitimate child and given it up—a fact which distinctly affected my attitude toward her plan."

It might be well to give those who inquire about the work a card similar to the one used in Boston, which is filled out with a real story, the names being disguised. On the reverse of the card is printed the following:

SURNAME		WOM'S FIRST NAME		NAMES OF AGENCIES	
Cohen		Bessie		Hebrew Ass'n 5/28/08	
		MAN'S FIRST NAME		Mass. Inf. Asy. 6/27/08	
		Abraham		St. Minor Wds. 10/16/08	
ALIAS				S.W.	
				Gwynne Home 3/3/09	
PREVIOUS MARRIAGES, HUSB. OR WIFE				Bos. Disp. SS. 11/17/08	
				Mass. Inf. Asy. 7/25/10	
BIRTHPLACE		DATE	OCCUPATION	Chdns. Mis'n. 7/25/10	
1. Russia		1874		Chdns. Friends 8/5/10	
2. Russia		1878		Mass. Gen. SS. 8/5/10	
MENTAL AND PHYSICAL DEFECTS				Dist. nurse 11/10/10	
CHILDREN		DATE	BIRTHPLACE	OCCUP'N	NAME HUSB. OR WIFE
Benjamin		1900	New York		
Morris		1903	"		
Bessie		1904	Boston		
Abraham		1907	"		
Mary		1907	"		
Jacob		1910	"		
DATE		ADDRESS	DATE	ADDRESS	
		Everett	1910	6910 Charter St.	
1908		1920 Dover			
1908		1650 Washington			
1908		1307 Warren Ave.			
1908		1482 Dover			
RELATIVES		ADDRESS	KIN	NO.	
Library Bureau 077611-△					

SAMPLE INDEX CARD OF THE BOSTON EXCHANGE

on which is also stamped the following: "Identification card (with names changed) of family described in the Annual Report of the Social Service Department of the Massachusetts General Hospital for 1910." (For reverse see p. 15 of this pamphlet.)

EXTRACT FROM THE ANNUAL REPORT OF THE SOCIAL SERVICE DEPARTMENT OF  
THE MASSACHUSETTS GENERAL HOSPITAL, 1910

"During the fall a patient was referred to us. Much agitated she tried to explain, in broken English, that she could not come for treatment because she had six children to care for and her husband was out of work. While the patient was still at the hospital, the Department inquired by telephone at the Confidential Exchange and learned that the family had been known for several years to the Hebrew Benevolent Association, the Mass. Infant Asylum, the Department of State Minor Wards of the State Board of Charity, and at different times to the Gwynne Home and the Children's Mission. Each of these agencies was communicated with and a conference of those most interested was called. In view of the new problem arising through the woman's illness a new plan for the family was worked out, the medical-social worker contributing her knowledge of the present physical needs. Two of the children remained in the care of the State; the Mass. Infant Asylum took charge of the baby until the mother was again well enough to receive it; work was found for the man and the Hebrew Benevolent Association furnished a visitor who could talk intelligently with the patient."

Try bringing objectors to the Exchange and showing them the mass of cards, in which any one card is obviously lost unless that family is again inquired about. *Emphasize the fact that nothing need be recorded about the family except the names, the address, and the names of the societies inquiring.* One woman, who had objected to inquiring about the families known to a society of which she was a director, came in to see the Exchange. The registrar looked up for her the card of a woman whom she knew, and when she saw it she said with astonishment, "Why, there is nothing bad about her on it!" All we can do is to show such people that inquiring, since it can do the family no harm and may do it infinite good, is not, therefore, a violation of confidence.

It is well to emphasize both in publications and in interviews with incipient inquirers the really confidential character of the Exchange. Not even the fact that a given family is known to the Exchange should be told to any individual unless the Exchange is certain that he has a legitimate charitable reason for inquiring. Commercial agencies, the sewing-machine or instalment collector, and even the lawyer or insurance agent should not be able to learn from the Exchange the present whereabouts of a family. Give information only to those who have a clearly defined social interest.

6. FURTHER ARGUMENTS.—The Exchange introduces agencies to one another. One physician spoke of his hesitation, when he first began using the Exchange, in calling up other agencies to ask what they knew of a family; he feared they would not give confidential information to a stranger. But when he said he had learned of their knowledge of the family through the Confidential Exchange, it proved an open sesame.

Emphasize the fact that the Exchange is a protection to the people indexed in it.

A man applied to a children's agency in Boston, asking that his child be taken by them and offering to pay its board. He said that the mother, Mary X., was an immoral woman whom he was unwilling to marry. In the Exchange, the man's

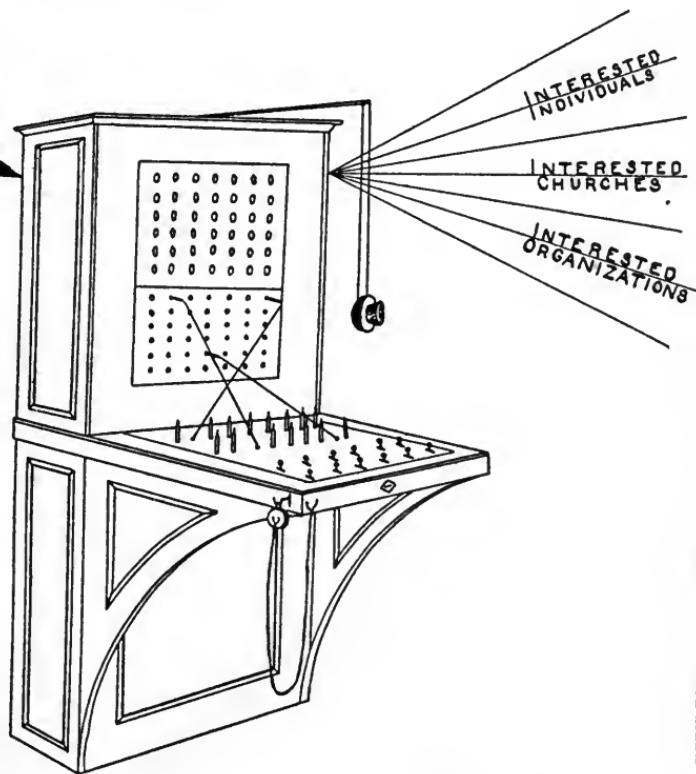
# THE CHAR

ASSOCIATED CHARITIES  
ASSOCIATED CHARITIES LODGE  
BABIES DISPENSARY  
CHARITY DISPENSARY  
CITY HOSPITAL  
CRIPPLE SCHOOL  
DAY NURSERY ASSOCIATION  
DEACONESS HOME  
DEP'T PUBLIC CHARITIES  
HAYMARKET TUBERCULOSIS DISPENSARY  
HOUSE OF CORRECTION  
HUMANE SOCIETY  
JUVENILE COURT  
LAKESEDIE DISPENSARY  
LAKESEDIE HOSPITAL  
LEGAL AID SOCIETY  
MATERNITY DISPENSARY  
NEWBURG TUBERCULOSIS DISPENSARY  
PROTESTANT ORPHAN ASYLUM  
RAINBOW COTTAGE  
SALVATION ARMY  
SOCIETY FOR PROMOTING  
ST PAUL'S M. E CATHEDRAL  
TRINITY CATHEDRAL  
TUBERCULOSIS DISPENSARY  
VICTORY MISSION  
VISITING NURSE ASSOCIATION  
VOLUNTEERS OF AMERICA  
WEST SIDE COTTAGE  
WEST SIDE TUBERCULOSIS DISPENSARY



# S CLEARING HOUSE

Will Connect You With Available  
Information From 30 Agencies  
Regarding 30,000 of Cleveland's  
Families.



RESS ~ 501 ST CLAIR AVE N.E.  
-EPHONES ~ MAIN 5183  
ERIE 112

name was given as a reference in the case of another girl, Nellie J., known to a second children's agency, and Mary X. herself proved to be known to the worker in a hospital social service department. Through inquiry of these two agencies the children's agency learned that the man was the father of Nellie J.'s illegitimate child, and that he had asked the second children's agency to take this child and then had disappeared. The social service worker, when she was leader of a working girls' club in a settlement, had known Mary well, and said that she was a capable and thoroughly nice girl. Through this earlier friendly acquaintance the hospital worker was able to get into touch with Mary again, to persuade her to confide to her mother this trouble, which she had kept from her, and eventually to induce her to go home with the child. The man, on realizing what was happening, left the state, but his whereabouts was learned and he was brought home for trial.

This argument is effective with those agencies which, because of their peculiarly intimate relation with their people, can appreciate the value to the family of having their own knowledge placed at the disposal of an agency newly interested. The pastor of a wealthy church doing extensive work among the poor decided to inquire when he was reminded that, if he did, other agencies would inquire of him before they began aiding, and thus give him a chance to say, "This is our family and we assume full responsibility for them."

Such agencies will often appreciate also the saving to the applicant's feelings that results from this pooling of knowledge. One woman, in the course of a few months, applied to practically every children's agency in Boston as well as to several other societies—nine of them, I believe—asking to have her children taken. She was a deserted wife, and the society which had the matter in charge was endeavoring to get hold of the man and bring him back, and had meantime taken two of the children. If each one of the nine had made a complete investigation (and they do make thorough ones in Boston), just think of the waste of time and energy, and the harm to the woman, who was honest but ignorant. Since each agency called up as soon as the woman came into its office, and referred her to the original agency, this was avoided.

Some societies probably never will consider it worth while to inquire about all their cases and from them we must take the half loaf that is better than no bread. In Baltimore some settlements inquire about all families that need any sort of special work done for them—not merely the giving of relief, but medical care, treatment for delinquency, etc. They realize that they need to know whether the tuberculosis association, the school nurses and visitors, and the school attendance officers have visited the family, and what efforts in their behalf have been made. The school nurses inquire about certain types of cases—backward and anæmic children, for instance, but not about all the children who come under their care. In Boston, the social service departments inquire, while the dispensaries proper do not. The superintendent of one dispensary said that the number of new cases in the dispensary, 75 to 100 a day, was prohibitive; it would take the time of a clerk at either end to do the work, and, as doctors do not see the value of a social background in most cases,

they would not use the information if they got it. Those cases that the hospital doctors think need a social as well as a medical diagnosis are referred to the social service department of the hospital and thus are registered in the Exchange.

It may be taken as a general rule, perhaps, that every agency that visits families in their homes, or whose advice is likely to be determined by or to affect home conditions, should use the Exchange. As an extreme example, it would obviously be of little value to inquire about all the children in the public schools, with our present public school program, but a school visitor who comes into direct contact with the family and its problems should inquire about the children for whom she is working, and a teacher might well inquire about any child presenting a special social problem. The treatment of chronic truancy, moreover, could be made more efficient by the Exchange.

**7. EARLY INQUIRY.**—When societies have agreed to inquire of the Exchange, the battle is not always won. They often neglect to do so because of pressure of work, because of lack of office equipment, most of all perhaps because they do not yet realize its importance vividly enough to do it in spite of obstacles. At the start patience and perseverance are therefore necessary. The Exchange must often be content to accept from an organization simply a list sent in at regular intervals of the families in which it has become interested since its last inquiry. This failure to inquire immediately about each case is almost inevitable with those organizations whose work is done by volunteers and which have no office, no clerical worker and no official telephone. In such cases the organization should specify one member of whom other organizations may make inquiry concerning individual families.

A steady effort must be made, however, to induce workers *to inquire before they act instead of recording afterward.* The value of the information is multiplied many times if it is secured before the investigation, to say nothing of the treatment, is begun. The right of families to our interest, our consideration and our best work demands this.

Some agencies which have a telephone in a room other than that used for interviewing, inquire as soon as they have secured the identifying information. They may find that the case is already in the hands of some one who will take full charge, or that so much of the family history is known to other agencies that even a full first interview is unnecessary. In contrast to this promptness may be cited a juvenile court that reports its cases at the end of the month. The workers in other societies complain that they often lose the opportunity to give information about family conditions which would have been most valuable to the court. An excellent stimulus to regular use of the Exchange is the report blank used in Boston. The report sent to each agency gives the exact number of inquiries that it has made during the month. Sometimes agencies are surprised to learn how seldom they have actually inquired of the Exchange, and are stimulated to more active use of it.

THE CONFIDENTIAL EXCHANGE  
43 HAWKINS ST., ROOM 31  
Telephone-Haymarket 371  
Office Hours 9 to 5 daily.

MONTHLY REPORT  
JUNE, 1911

To.....

(A report like this is sent each month to co-operating agencies.)

Inquiries and Reports	Received from YOUR agency.....
Reports	Sent to YOUR agency.....

SUMMARY

JUNE 1, 1910, TO MAY 31, 1911.

Number of Agencies	Inquiries and Reports Received	Reports Sent
38 Children's Agencies.....	8,367	4,698
33 Medical " .....	8,944	4,113
27 Relief " .....	21,153	4,959
37 Religious " .....	356	162
*58 Miscellaneous " .....	25,794	17,650
95 Agencies in other cities.....	479	135
(267 Private Individuals.) .....	343	76
Total 288.....	65,436	31,793
Total number of <i>new names</i> added during the year.....		13,440
Total number of names previously indexed upon which a report or inquiry has been received during the year.....		6,321
		19,761

It takes a larger staff to conduct the Exchange if people inquire at once about each case than if they send slips at the end of a week, but it is by such prompt, constant inquiry that the success of the Exchange will be assured. I believe, therefore, that it is well not to start the Exchange until the society is ready to provide adequate clerical and telephone service.

8. USING THE INFORMATION.—The inquiry is, however, only half the story; agencies must use what they get from the Exchange, and here lies one of the most frequent causes of failure and one most difficult to remedy.

\* This includes inquiries and reports from 16 districts of the Associated Charities.

An outdoor relief official showed me his day's slips from the Confidential Exchange with pride. A rapid glance indicated that, of his thirty new cases that day, every one was known to one other agency, many to several, and one to six others. On my inquiring what was the next step, he said cheerfully, "Oh, we don't do anything with them." As a matter of fact, of course, his inquiry was of value, since other societies, such as the children's aid society, the charity organization society, and the tuberculosis association, wish to know if the relief department visits their families. But for his own work he made no use of the information thus available, though admitting that his staff of investigators was inadequate to do good work with the families under their care. As one physician said, "The Confidential Exchange is the right plan and is well run. Its value to us depends on ourselves, on whether we make use of the sources of information thus secured."

Some societies inquire of agencies who have previously known the family only when the problem is difficult, or inquire only of agencies having full records and intimate knowledge of their families. Probably one of the best services which a council or advisory committee can render is to discuss fully and frankly this side of the work, showing cases in which a seemingly unpromising line of inquiry gave information of real value.

In one instance a society was making desperate efforts to secure the commitment of a degenerate, feeble-minded girl, and needed evidence that there was an hereditary tendency to insanity in the family. After several clues offered by the Confidential Exchange had been followed up without success, they learned from an old-fashioned relief society, whose records consisted of a few lines written in a book, that the girl had an uncle in the state insane asylum. From the record in the asylum they secured many facts about the family heredity and also the name of the town in which the family had lived, where further invaluable data were brought to light. The last agency that one would have considered it worth while to inquire of held the clue to the needed evidence.

Inquiries are difficult and unsatisfactory, of course, when agencies have no telephone connection or have inadequate records. But the following up of every possible clue, even in apparently simple cases, should be strongly urged. If inquiries are frequent, agencies will be stimulated to make investigations and to keep records that will save them the humiliation of having to admit their ignorance. This is one reason for urging certain societies to join the Exchange, even if their work is so poor that their use of it will be neither constant nor intelligent, and their help to those already co-operating very slight. One society had always kept the records of families whose names began with the same letter of the alphabet in one drawer in the haphazard order in which they chanced to come. After they had looked over fifty records early in the morning because the city charities wanted information about Mrs. Mary Brown, and looked through the same fifty the next hour to tell the children's aid society what they

knew of Mrs. Bailey, they began to understand the value of correct filing.

With all newly interested societies and those having elementary systems of record-keeping, the workers in the Exchange must be very patient. These new recruits will come to appreciate its service gradually, and to realize that they too have knowledge to contribute that can be of distinct value to other societies. Each inquiry which brings worth-while knowledge will increase in geometrical ratio their willingness to make use of the Exchange, even at some expense of time and effort.

It is the same old story in this beginning as in all others that have social welfare for their goal; we must be ready to catch the other person's point of view, must be patient in trying to change it, ready to accept any advance, never assuming that hesitancy to inquire means antagonism to the plan.

To the casual onlooker, the Confidential Exchange, with its files of cards, must seem to embody the maximum of red tape with the minimum of "charity." We must kindle his imagination, that he may see as we do that behind the machinery is a constructive force; that the Exchange is not a device for preventing overlapping of relief, that it is not a benevolent detective agency, but that it does conserve and render more efficient our service to an important section of the community. The Exchange, aside from its primary purpose of bringing about an exchange of information, may thus be a definite stimulus to better standards of work in the societies using it.

#### IV. OFFICE METHODS

Let us now return to a more detailed consideration of the index files which constitute the mechanism of the Exchange, for its success depends in part on whether cards and filing systems make identification quick and accurate.

1. CARD INDEXES.—The system should be thought out with great care at the start, and one should be adopted which is capable of indefinite expansion. Baltimore, after three years, has 80,000 cards, Cleveland in two years 30,000. Choose at the start the best form, not a makeshift, since with each month a change in the filing system becomes more difficult and expensive. Even when the charity organization society has had an index for its own records, which is not suitable for the Exchange, it is better to adopt a new card, copying the charity organization society cards gradually, as is being done in Baltimore and Philadelphia. Though each society feels, and rightly, that it must start economically, the initial cost of installing a record system is so small, compared with the continued expense for salaries to operate it, that it is more economical in the long run to adopt a system that makes the work easy and thus lowers the constant expense for salaries. This is shown by some Boston figures. In 1901, 98 different agencies inquired; in 1911, 288 different agencies inquired

SURNAME		FIRST NAME OF NO. 1 (MAN)		AGENCIES		DATE
Harrington, (Arthur)		dead		24687		Fb7'12
		FIRST NAME OF NO. 2 (WOMAN)				
		Amanda				
NO.	ALIASES		B		C.A.S. Ap19'10	
NO.			W		City Dm14'11	
NO.	TO Neillie Jones				F.L.D. Mc26'12	
NO.	TO					
NO.	BIRTHPLACE	YEAR	OCCUPATION			
	England	'70	carpenter			
	Boston	'72				
NO.	MENTAL AND PHYSICAL DEFECTS					
NO.						
CHILDREN		BIRTH YEAR	DATE	ADDRESSES OF THE FAMILY		
Stella		'02	1909	241 West St		
John		'04	1911	187 Summer St		
Amanda		'06	1912	24 Clinton St		
Walter		'08				
ADDRESSES PRIOR TO 1ST RECORD						
82 New St.						
167 Eagle St.						
RELATIVES		ADDRESSES		MIN	TO	NO
Mary Walters, 261 Tenth St., sis		2				
Thomas Jones, 41 Main St., bro		2				
FORM NO. 20						

INDEX CARD FOR A CONFIDENTIAL EXCHANGE.

This case index card, with accompanying directions, is sold at cost by the Charity Organization Department of the Russell Sage Foundation. A revised edition of the card is now in press. The most important change will be the placing of the woman's name first, as on the Boston card.

about 19,761 families 65,436 times, and yet the clerical force of the Exchange was no larger than it was in 1901. By eliminating the copying of records, by simplifying index cards, by better methods of filing, this tremendously increased bulk of work is still handled by eleven persons.

The Exchange consists of two indexes—one the general index of all families or unattached persons known to the Exchange, the other the street index in which these are classified according to the numbers of the streets on which they live. The cards in the latter file are the same size as the general index card, and each represents one street number; on this are entered all the families who have lived or now live at that address, made out as follows:

123 Charles St.,

Jones, Mary and John.  
Potter, Jane and Walter.

When one of these families moves, the name is entered on the card for the new address. Some societies also cross out the name on the old card, though this is not absolutely necessary.

In the general index are alphabetically arranged cards for all families known to the Exchange, on which appear those items useful in identifying—first names, addresses, relatives, physical defects, etc. When the Exchange is conducted by the charity organization society, the index cards for their cases are included in this file, so that no other index is necessary. At the top of the card is a space for the number of the case record.

The entries on the cards, certainly the family name, should be typewritten, since this assures more rapid identification and greater accuracy in filing.

In addition to these index cards, plain cards of a different color should be used for cross references, such as aliases, other possible spellings for family names, the woman's maiden name (in foreign families), the name of each relative, etc. As an illustration of the use of the latter, an agency inquiring about Amanda Jameson is informed that she herself is not known to any agency, but that her daughter, Jane Potter, has been known to the city charities and the associated charities:

Jameson, Amanda, wid.  
Mother of woman,  
Potter, Jane and Walter

Their records may throw light on the history and character of Mrs. Jameson. In indexing surnames which have various spellings, the index card is not necessarily made out under the spelling which

the applicant uses, but under the most common spelling of the name, and a reference card is made from the spelling used by the applicant. For instance, all Reillys, O'Reillys and Rileys would be indexed under *Reilly*, with cross references like the following:

O'Reilly, Martha wid. John  
see Reilly.

This is the simplest method and involves the least writing and the briefest search.

2. **FILING CABINETS.**—The index cards used in Boston, New York, Philadelphia and Baltimore are so printed as to file with the shorter side at the top.\* This saves considerable floor space, an important consideration in large agencies; it is also easier to handle cards filed in this way. Although in the standard filing cabinets cards are filed the other way, these vertically arranged cards can be used in the trays adopted by the Boston Exchange for its simple and satisfactory filing system. The index cards of that Exchange are filed in open japanned tin trays the height and width of the card, and twenty inches deep—an easy reach for the arm of the filing clerk. These are placed on an ordinary kitchen table, of a height to make it easy to read the cards, and are covered at night with dust-proof cloths. The initial expense of this system is small, as a box which holds 1,300 cards can be secured for \$1.20. For \$25 one can secure an equipment, including table and boxes, providing for 20,000 cards. This system is not only economical; it also provides for indefinite growth, and is thus a good one for cities in which the Exchange is still an experiment.

A more expensive plan is to use a four-drawer filing cabinet holding approximately 4,000 cards, which costs \$12; additional sections to be secured as needed. A very complete filing cabinet has recently been devised for the New York Charity Organization Society. The top is an oak tray, with a sliding cover, which holds three rows of vertical cards, with partitions between the rows. Below are two drawers, one under the other. The disadvantages of this system are the waste of time and effort involved in pulling out the drawers; the fact that the three levels of cards cannot all be at a convenient height for the eye of the worker; and that with the drawers one above another it is difficult for more than one worker to consult the cabinet at a time. It has the advantage, of course, of occupying less floor space than does the Boston system, though only a few of the largest Exchanges need to consider this point seriously.†

A third method is to file the cards in large shallow cabinets just the height of the card, with partitions dividing them into rows the

\* The Boston and the New York cards are printed by the Library Bureau and are adapted to the use of any Exchange.

† These special files for the cards can be secured from the Library Bureau.

width of the card. These rest on standards that bring them up to the correct height for the use of the clerks. In Baltimore, such cases, holding at least 80,000 cards, were secured for \$180.

Judging from the experiences of the cities which have Exchanges, the best system is one that brings the cards in open cabinets at the right height for easy reading and of a depth adjusted to the reach of the clerk's arm. To consider these details carefully at the start makes for efficiency without additional expense.

3. METHODS OF INQUIRY.—The Exchanges usually permit societies to inquire either by telephone or by mail. In the latter case, slips are printed or multigraphed, made up into pads, and distributed free of cost to the societies using them. These slips correspond in the points covered and, so far as possible, in general arrangement with the index cards, so that they can be easily copied. They are used also for taking down telephone inquiries.

When an inquiry is received, the name is at once looked up, first in the street index, where cases are easily identified in spite of possible differences in spelling. Whether found in the street index or not, it is then looked up in the alphabetical index. If no record of it is found, the index cards are at once made for it; if a record is found, the name of the society inquiring and the date are added to the column "agencies interested." This agency is at once given the names of societies that have previously inquired. This is done by telephone, if the inquiry has been made by telephone. If by slip, the names of the agencies and the dates of inquiry are stamped on the slip itself, in the space at the bottom, and the slip is then mailed back to the agency inquiring. The Exchange then reports this new inquiry to the societies which have previously inquired about the family. Experience has indicated that it is wiser for the Exchange to pass on *no information* in regard to the family other than the names of interested societies.

If sufficient information is not given to make identification possible, the agency inquiring is so notified, with the request that it inform the Exchange when further facts are secured. In Baltimore, the clerk puts the inquiry slips for such cases in a basket and, at the end of the week, if she has not received additional information from the agency, she calls them up to ask for it. Chicago registers them on a card of a different color in a separate file, and reminds delinquent agencies from time to time of the cases still waiting further information. Both of these plans have the great disadvantage of making another place in which to hunt for each new case. This can be obviated by making and filing regular index cards as soon as inquiries are received, no matter how meagre the information. In addition, temporary cards should be made bearing only the date, names of the family and the inquiring agency, to be filed in a desk tray. These can be examined every few days and the delinquent agencies reminded, the cards being destroyed as soon as the information is received. Boston leaves the responsibility to the agency inquiring, except that when another

**Remarks:** \_\_\_\_\_

## Report from Bureau for Confidential Exchange of Information

SLIP FURNISHED BY THE BOSTON ASSOCIATED CHARITIES TO INQUIRING AGENCIES.

agency inquires about a family that resembles one of these unidentified cases the first agency is telephoned to for full information. In a new Exchange, some follow-up work is probably desirable if not necessary, so that the agencies will realize the necessity for furnishing full identifying information.

Should agencies which inquire by telephone be asked to confirm the message by sending in a written slip? Boston and Philadelphia allow the telephone message to stand without confirmation, believing that the time required to make out slips is not worth while for the few errors that would be thus detected. To rely on the telephone seems rather dangerous, as names are so hard to understand, but I was assured that the registrars rarely learn of errors that have occurred. In Baltimore, where the Exchange does ask societies to send a slip after telephoning, the identification clerk says that she frequently receives new spellings that enable her to identify a case that she had failed to discover before. If telephone messages are accepted, the clerk must be trained to be patient and careful, and to read back the names and addresses to the inquirer, spelling all unusual names. If the inquiring agencies realize that this is final, they undoubtedly use more care themselves in giving the message.

It may seem wise to check up the telephone messages; in that case the memorandum slips on which they are taken may be kept and sent to all inquiring agencies at the end of the month, with the request that the names be verified and the Exchange notified of errors. If they choose to neglect this the responsibility for mistakes would rest with them and not with the Exchange. Obviously, if agencies are to inquire before acting, speed is desirable, and this can best be secured by using the telephone, but speed should not be gained at the cost of accuracy.

Some agencies have offered to fill out the index cards themselves for the Exchange. Identification, however, is more difficult if the index cards are not perfectly uniform—and uniformity is hard to secure if the cards are filled out by different people. Moreover, every card filled out and sent in for a case already in the Exchange means duplication of work. The consensus of opinion is that information should be given by telephone or on a slip, and the card itself typewritten in the office of the Confidential Exchange.

In some Exchanges, societies are asked to re-register once a year cases with which they are still in touch. This is undesirable. The Confidential Exchange should not try to keep track of which societies are interested at any given time in a given case; it should merely indicate that at the date registered a certain society did know the family. Whether it is still in touch with that family or desires to assume responsibility for it, can only be learned from the society directly. This I believe to be a most important point. The attempt to keep track of the agencies actually working on a given case would mean an impossible amount of work or result in endless confusion.

4. THE PERSONAL EQUATION.—With a sound system as a basis,

the details should be kept so elastic that they can be adapted where necessary to the methods of societies using the Exchange. In Cleveland one dispensary, instead of using an inquiry slip, sent the record card it had made out for its own use. The Exchange returned this, after stamping on the back the names of the agencies interested. The dispensary thus secured the names of agencies interested for its permanent record without having to do any copying in its office. The card was submitted for approval to the Exchange, which found that it could easily make the index from this record form. Especially at the start or with new agencies you must take what you can get, in any form in which you can get it, gradually endeavoring to make the method uniform.

In discussing office system, reference should be made to the need of carefully choosing and training the office staff, however small it may be. The person in charge must have both business efficiency and a social view-point. He has the opportunity to make other agencies realize that the Exchange can increase the efficiency of their work with families; to emphasize, that is, its positive value. He must also appreciate, however, the necessity for making the Exchange work accurately and easily. The inquiring agencies are busy and some of them do not realize its full value; consequently the Confidential Exchange must so plan the details of the work that inquiring will be easy and satisfactory for them. A minor detail, but one that some of those who inquire as well as several registrars have assured me is most important, is the telephone manner of the office staff. Patience and courtesy, a pleasant voice, quick recognition of the agency, an understanding of the kind of work each does and its point of view, all help to make societies like to use the Exchange. Through the telephone the Confidential Exchange comes into direct contact with the agencies using it and consequently the telephone operator must be able to give expression to the spirit of the management—not that she need be a trained worker, but that her personal qualities must be considered in choosing her for the position.

5. Cost.—This is another phase of charity organization work in which salaries constitute practically the total expense, for the initial cost of installation is small. In one agency which during a recent month received 614 inquiries, 205 of which were identified, the cost per month for the wages of three clerks and one-half the time of the registrar was \$135. The Charities Clearing House of Cleveland cost during the year October 1, 1910, to September 30, 1911, \$1,124.17. Of this, \$1,005 was for salaries, \$18 for telephone, \$101.17 for supplies, including printing and a filing cabinet. The Confidential Exchange in Boston spent in 1911, for salaries, \$5,559.29; for filing cases and supplies, \$775.50; for light and care of office, \$144.04; the annual expense for salaries being 85 per cent. of the total expense. Telephones constitute an additional expense, since an extra trunk line is usually necessary, and in large cities more than one.

Thus we have seen that a form of service started years ago to meet a need of that time has grown into something quite different that meets the wider, more constructive needs of the present. Beyond a doubt, Exchanges will develop still further, but the course of their development will be less erratic if we study the methods of those now in operation, some of which are admirably adapted to present-day needs. It is in the hope that their mistakes could be avoided and the best of their discoveries utilized that the foregoing pages have been written.

PUBLICATIONS OF THE CHARITY ORGANIZATION  
DEPARTMENT OF THE RUSSELL SAGE  
FOUNDATION

## **SERIES B LEAFLETS**

1. WHAT IS ORGANIZED CHARITY?  
 2. RELIEF—A PRIMER.....Frederic Almy.  
 3. TREATMENT—(FAMILY REHABILITATION).....Porter R. Lee.  
 4. PASSING ON AS A METHOD OF CHARITABLE RELIEF.  
 No. 1, 80 cents a hundred. No. 3, 70 cents a hundred, Nos. 2 and 5, \$1.40 a hundred.  
 These prices and all that follows include postage or expressage.

These prices and all that follow include postage or expressage.

## MISCELLANEOUS PAMPHLETS

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